

Figure 1

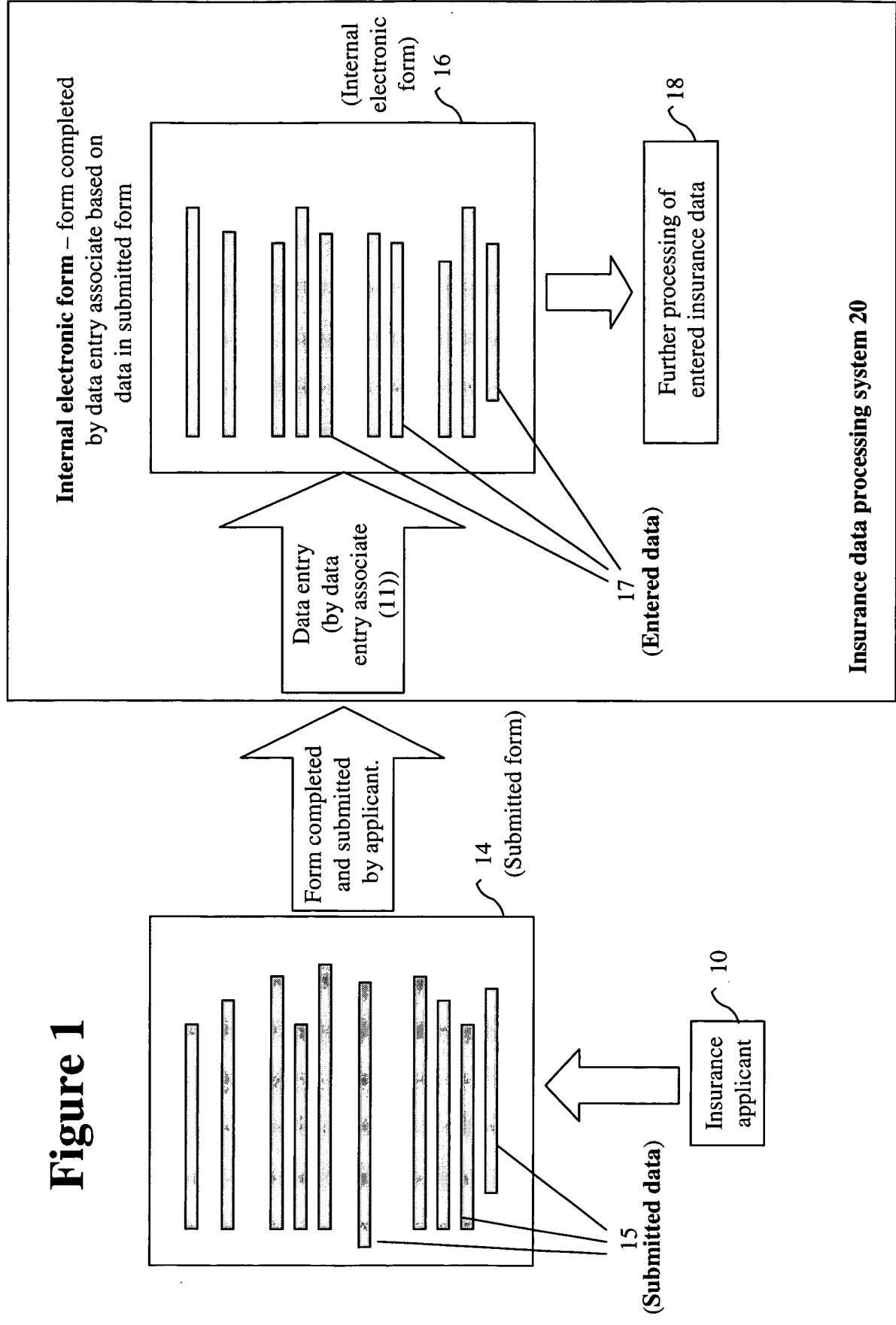
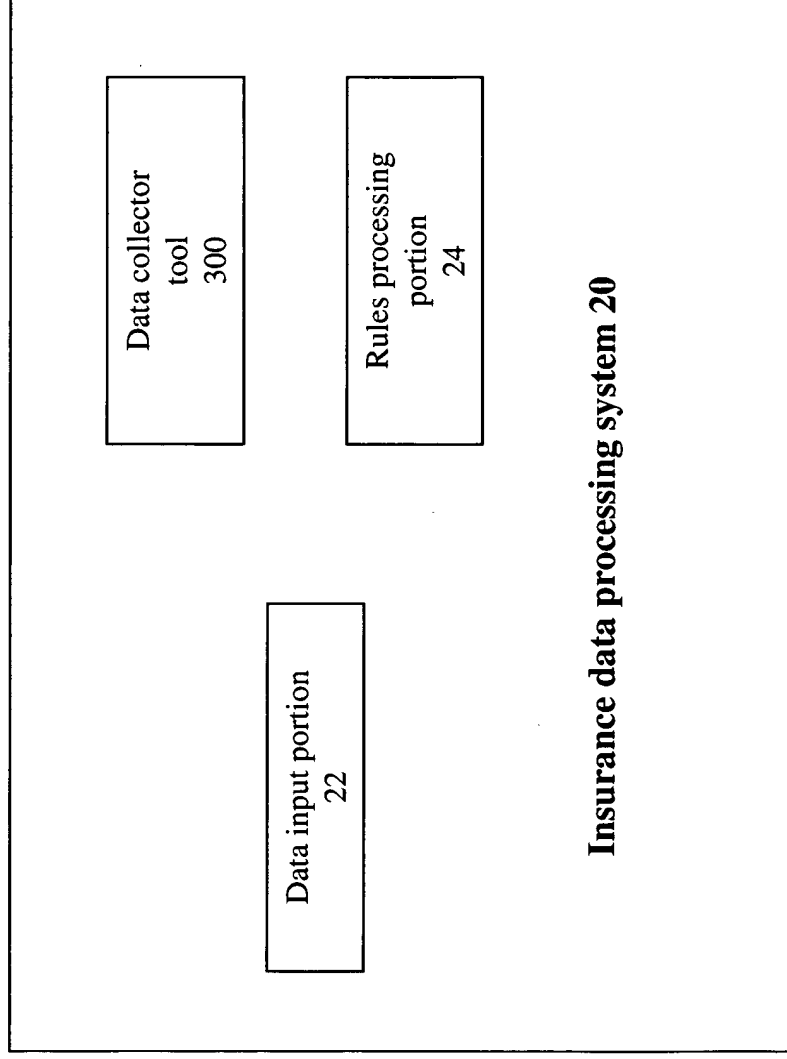


Figure 2



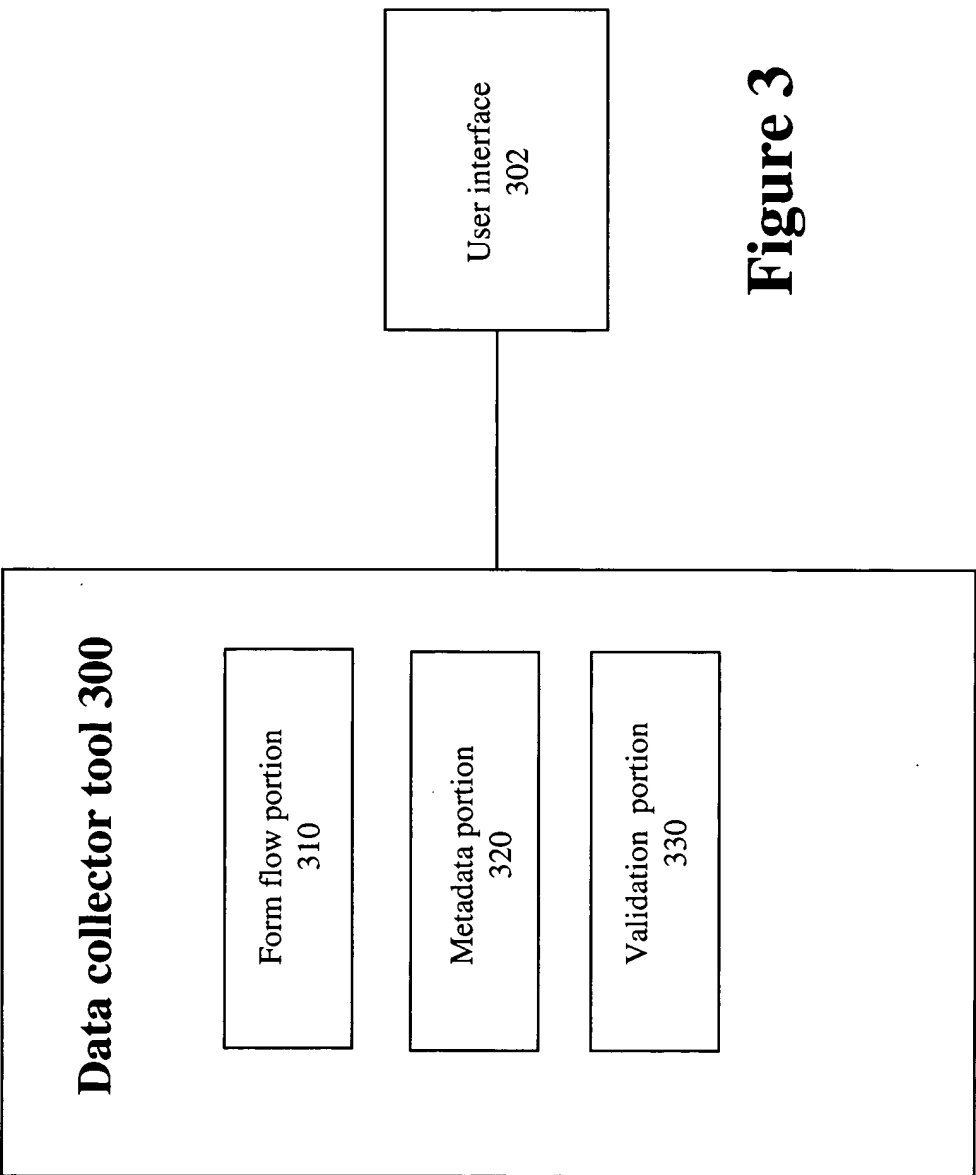


Figure 3

Check box question: <input checked="" type="checkbox"/> Y <input type="checkbox"/> N	42
Radio button question: <input checked="" type="radio"/> Y <input type="radio"/> N	44
<input type="checkbox"/> Question....?	45
Combo box question L1	46
List box question: L1	48

Figure 4

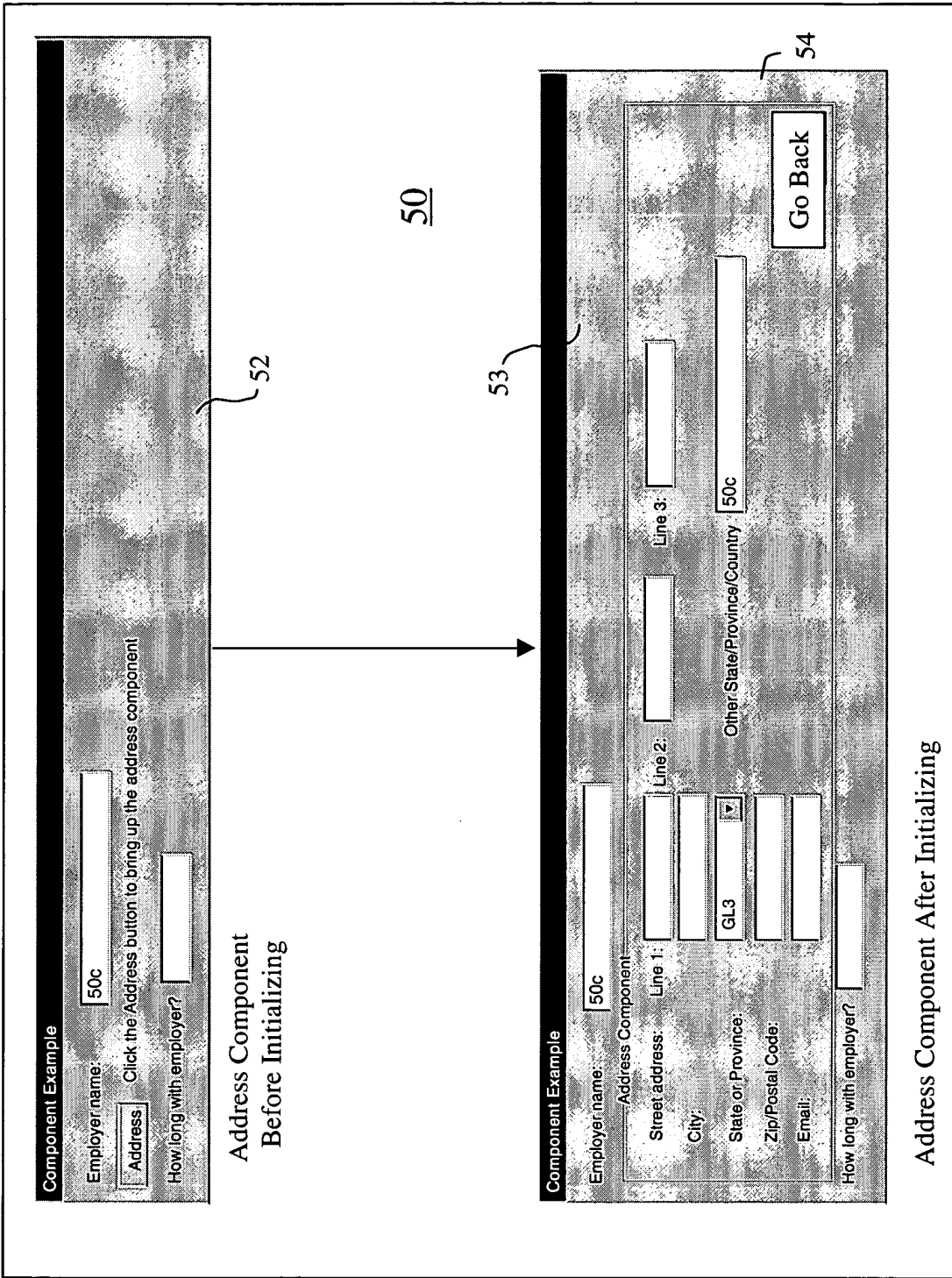


Figure 5

Form Buttons







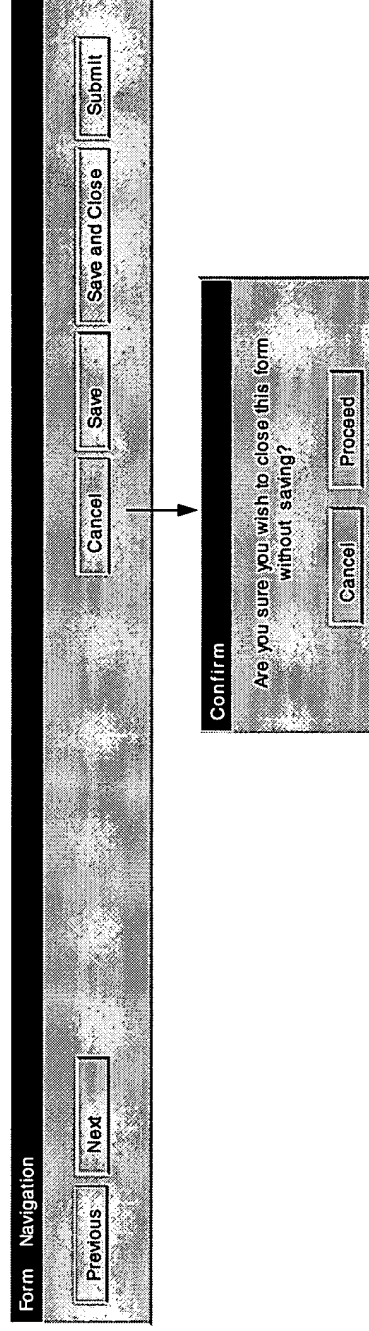
Button Name	Placement	Action
	Include on all but the first page.	Saves the form and takes the DEO to the previous page of the form.
	Include on all but the last page.	Saves the form and takes the DEO to the next page of the form.
	Include on all pages.	Returns the DEO to the "Application Package" page without saving. Status will not be changed, unless other pages of the form have been saved. Opens a confirmation window prior to closing form.
	Include on all but the last page.	Save page data.
	Include on all pages.	Saves page data and returns DEO to the "Application Package" page. Updates the status to "saved."
	Include only on last page.	Saves and submits the form. Sets the form status as complete in the "Application Package" page.

Figure 6

Figure 7



Content sensitive logic

Event	Action
User selects "Other" from a combo box	System displays an "Other" text box.
User selects "Other" checkbox in a group of checkboxes	System displays the "Other" group box.
User clicks an "Address" button	System displays the address fields.
User selects multiple values from a list box.	System displays flows for each value selected.
User selects "other" radio button	System displays the "Other" group box.

Figure 8

Sample Remarks Question

Do you have any other application or informal inquiry for life insurance pending in any company or society?

R40 ☐ Yes ☐ No

Remarks R40

902

Sample remarks question

Figure 9

Sample remarks page

Remarks Page

Select additional remarks flow from this list: List of all Remarks flows

Remarks Flow 1
Dynamically generate remarks flows in the order they appear on the form flow

Remarks Flow 2...
Dynamically generate remarks flows in the order they appear on the form flow

Remove Return to Question

Remove Return to Question

102

Figure 10

Sample repeating question

Sample Repeated Question

Trustee Bank

Bank name:

Address:

Click the Address button to insert the address component

More

Trustee Bank

Bank name:

Address:

Click the Address button to insert the address component

More Remove

1102

Figure 11

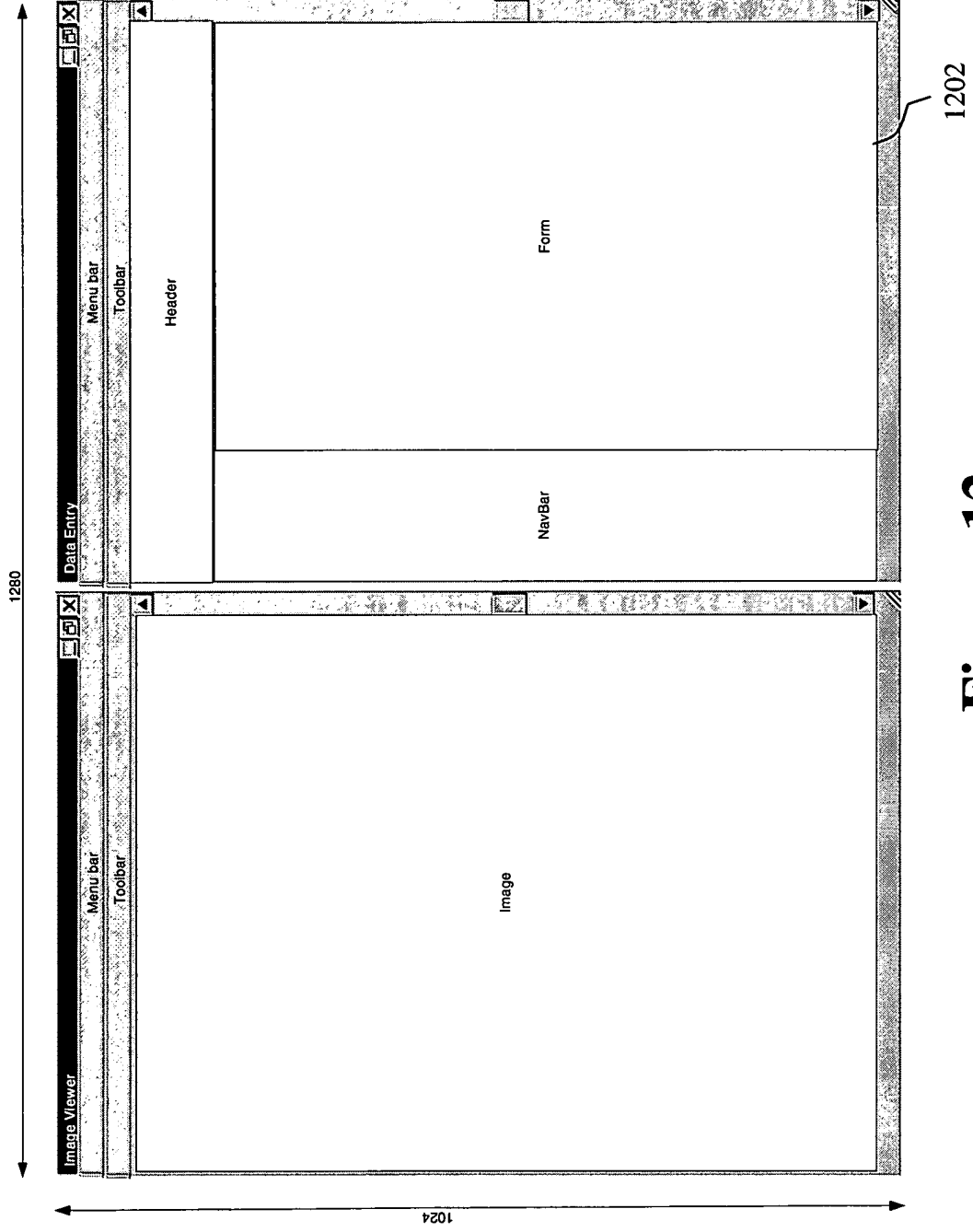


Figure 12

Signature Verification

Proposed Insured Signature: Detailed signature verification

☒ Signature matches name

☐ Signature does not match name

☐ Can not tell if signature matches name

☐ Signed with an X

☐ Form is not signed

Did the agent sign the form? ☐ Yes ☐ No Normal signature verification

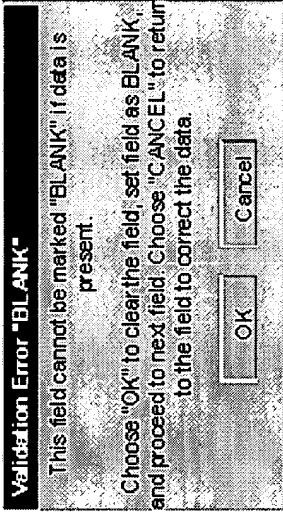
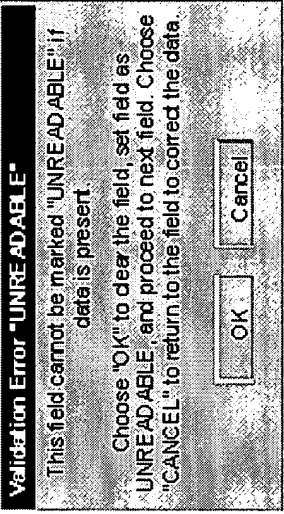
1302

Figure 13

Attribute Activation and Identification

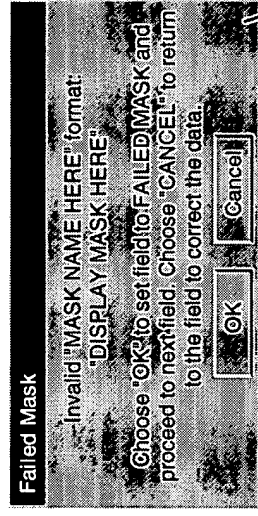
Attribute	Activation	Identification
Altered	CTRL+ G or via page level validation window.	Green Label
Blank*	CTRL+ B or via page level validation window.	Bold Label
Unreadable*	CTRL+ U or via combination level validation.	<u>Underline Label</u>
Failed mask**	System Driven	Italic Label
Altered and blank	Both attributes activated separately as previously mentioned.	Green and Bold
Altered and unreadable	Both attributes activated separately as previously mentioned.	<u>Green and Underlined</u>
Altered and failed mask	Both attributes activated separately as previously mentioned.	Green and Italic
<p>* Usage: System will not allow user to tag a field as blank or unreadable if there is data in the field. Likewise, the system will remove existing blank and unreadable tags from a field if a user enters data into the field. Allow users to switch between Blank and Unreadable without warning.</p> <p>** Usage: System will check mask fields upon exit and automatically set this attribute to FM or not FM. User can not modify this attribute.</p>		

Figure 14

Condition	Message
Field set as "BLANK" and: <ul style="list-style-type: none"> • Text field is not empty. • List box has other than "blank" selected. • Checkbox group has any checkbox checked. 	 <p>Validation Error "BLANK"</p> <p>This field cannot be marked "BLANK" if data is present.</p> <p>Choose "OK" to clear the field, set field as BLANK, and proceed to next field. Choose "CANCEL" to return to the field to correct the data.</p> <p>OK Cancel</p>
Field set as "UNREADABLE" and: <ul style="list-style-type: none"> • Text field is not empty. • List box has other than "blank" selected. • Checkbox group has any checkbox checked. 	 <p>Validation Error "UNREADABLE"</p> <p>This field cannot be marked "UNREADABLE" if data is present.</p> <p>Choose "OK" to clear the field, set field as UNREADABLE, and proceed to next field. Choose "CANCEL" to return to the field to correct the data.</p> <p>OK Cancel</p>

1502

Figure 15



1602

Figure 16

Mask Name	Mask
Phone Number Mask	(NNN) NNN-NNNN ext NNNNN
Date Mask	MM/DD/CCYY
Zip Code Mask	US: NNNNN-NNNN
	CANADA: ##ANANAN
	OTHER: No mask
SSN Mask	NNN-NN-NNNN
TTN Mask	NN-NNNNNNN
Dollar Amount Mask	\$NNN,NNN,NNN.NN
Percentage Mask	NNN.NN%
Driver's License Mask	NNN-NN-NNNN
Years	NNN
Age	NNN

Figure 17

Figure 18

Condition	Message
Field fails checkbox combination.	<div><div>Failed Combination</div><p>You have selected an invalid combination of checkboxes. This question allows for only one checkbox selection.</p><p>Choose "OK" to clear the field, set field as UNREADABLE, and proceed to next field. Choose "CANCEL" to return to the field to correct the data.</p><div><div>OK</div><div>Cancel</div></div></div>

Page Level Validation

Complete the following invalid fields:

Failed Field Validation Check

Section 1

Field A: ☐ Blank ☐ Unreadable

Field B: ☐ ☐

Section 2

Field A: ☐ ☐

Field B: ☐ ☐

Failed Address Check

You Entered: Lynchburg VA 90210

Values entered by user

Callout to AIS to populate this field

Possible Addresses:

Beverly Hills, CA 90210

Lynchburg, VA 24501

Lynchburg, VA 24502

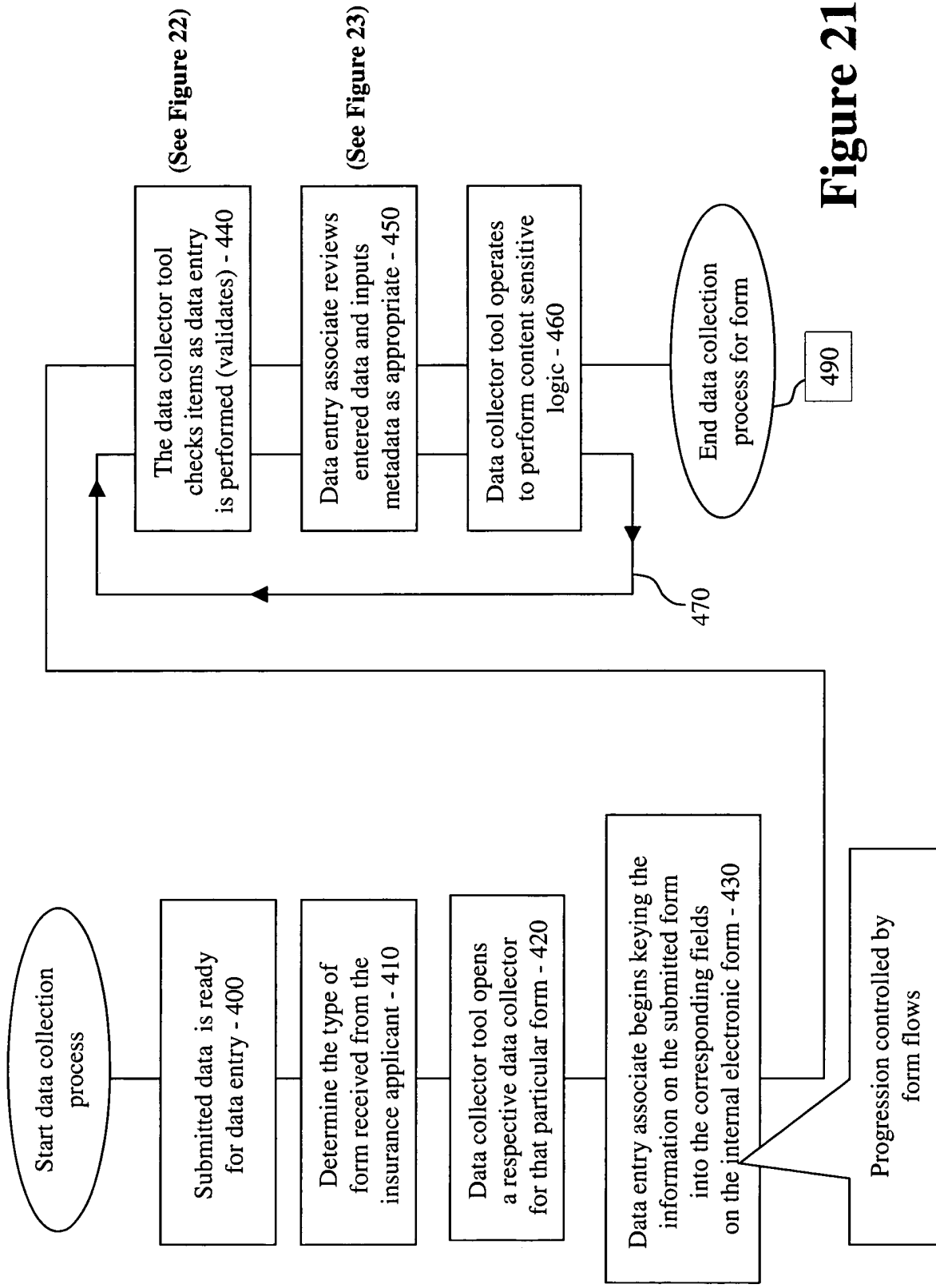
etc...

Cancel

Update

1902

Figure 19



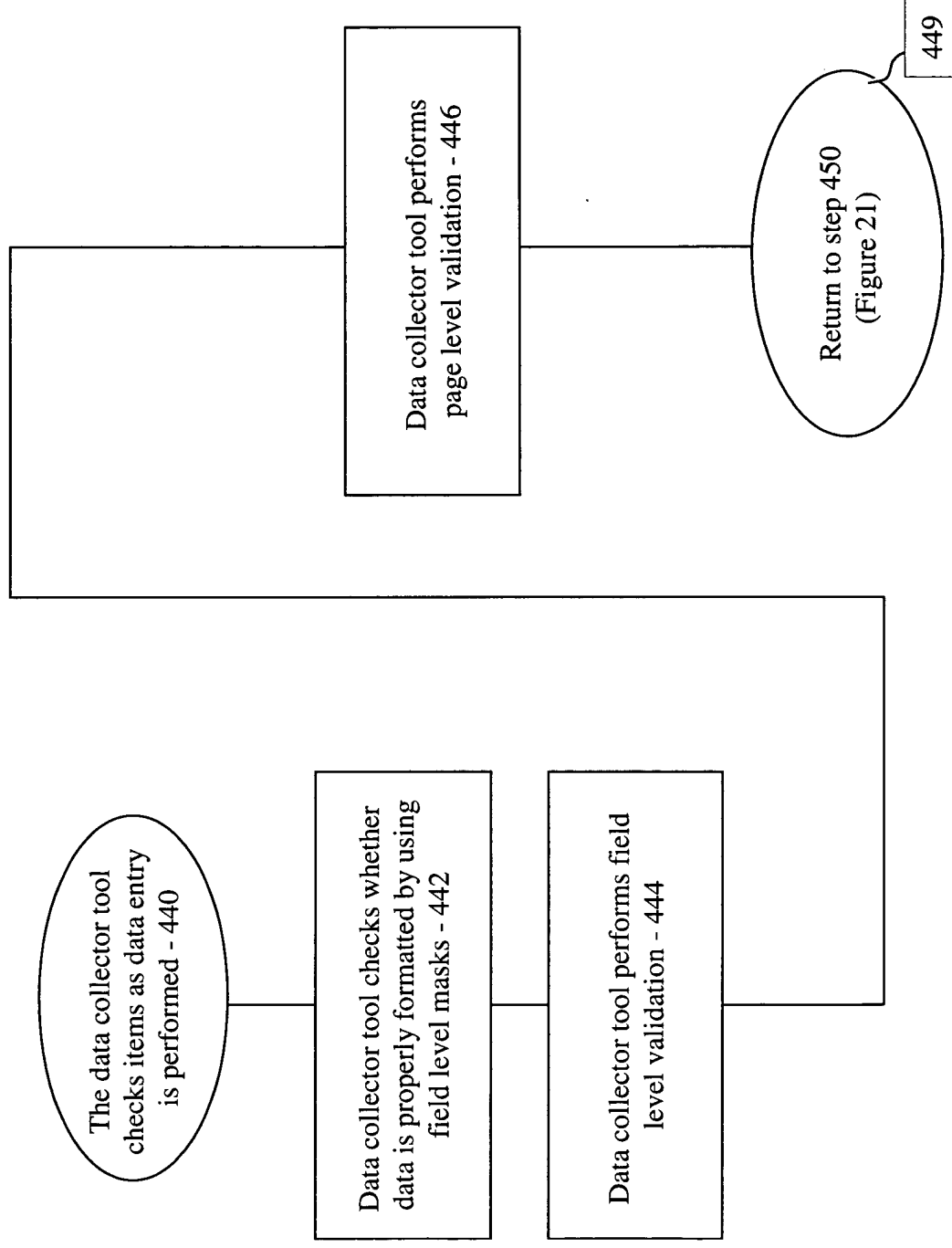


Figure 22

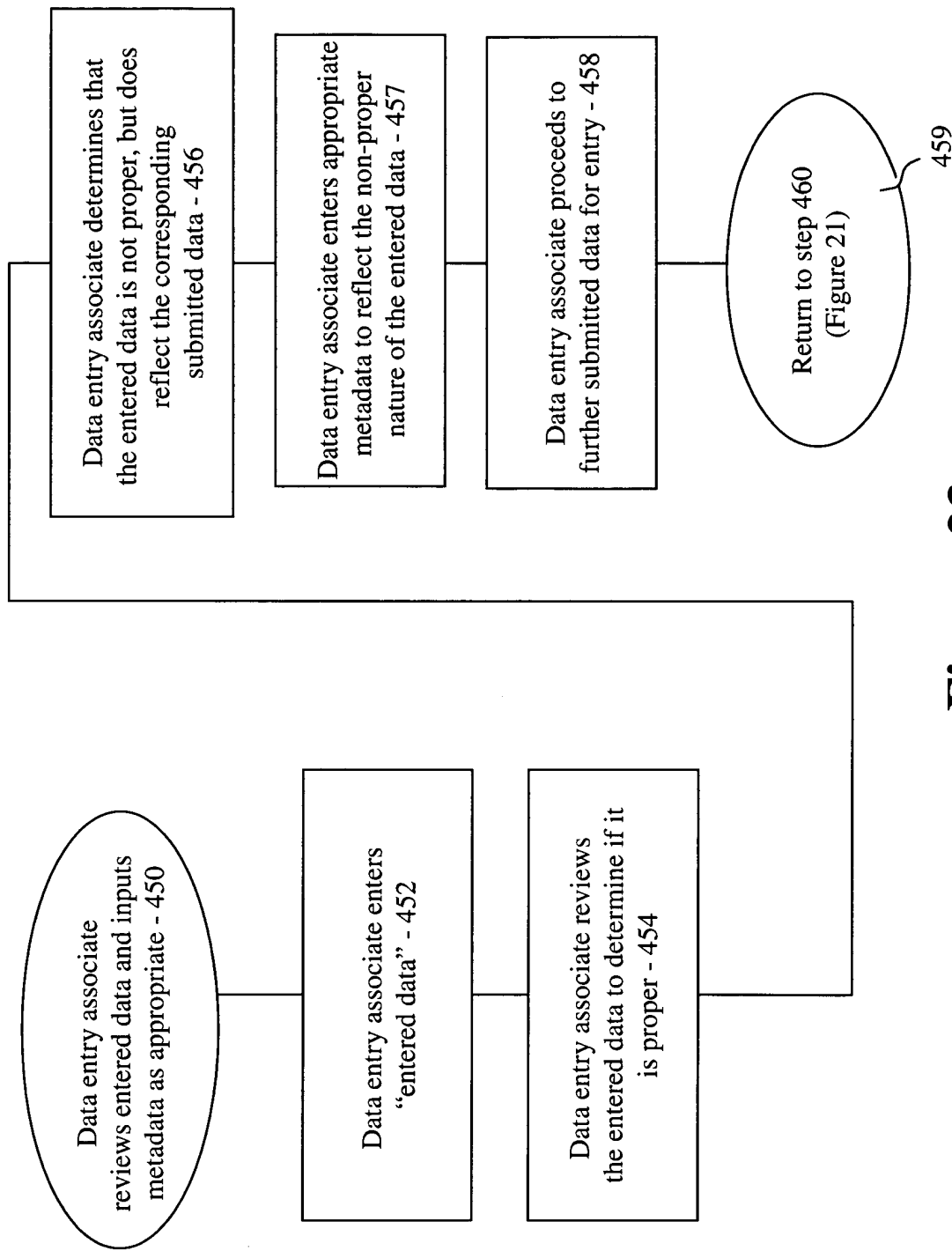


Figure 23